

UK SMALL BUSINESS

Basic Automation Guide



JOSHUA
THOMPSON



INTRODUCTION

- A. What is 'Automation'**
- B. Why Automate (CMCM) & Principles**
- C. Basic Tech 'Stack'**
- D. Website Submissions**
- E. Accounting/Invoicing**
- F. HR**
- G. AI Automations**
- H. Productivity isn't everything.. it's almost everything.**

WHAT IS AUTOMATION

Automation - for our purposes is going to be:

**“How we can use SYSTEMS to fill the role of a HUMAN
To maximise the **EFFICIENCY** and **PROFITABILITY** of a
Small UK business”**

“Before asking for more Headcount and resources, teams must demonstrate why they cannot get what they want done using AI. What would this area look like if autonomous AI agents were already part of the team?”

- Shopify CEO

**“IF YOU CAN’T MEASURE IT
YOU CAN’T MANAGE IT”**

(CMCM)

Manually create invoice in Microsoft Excel
(10 Minutes)

Manually email a customer
(8 Minutes)

Keep Chasing via Email/SMS/WhatsApp
(15-180 Minutes)

Reconcile Invoice & Manually Mark as Paid
(8 Minutes)

Thank customer & upload invoice to Xero
(9Minutes)



Use a pre-built form
to send invoice data
(2 Minutes)



Email & WhatsApp
Customer with invoice



Automatically send
reminders to pay



Upload invoice data
to Google Sheets



Auto-upload invoice
to Xero

BASIC TECH STACK



**WEBSITE
SUBMISSIONS**

ACCOUNTING

HR

AI-AUTOMATIONS

**“PRODUCTIVITY ISN’T EVERYTHING BUT
IN THE LONG RUN, IT’S ALMOST
EVERYTHING.”**

- Paul Krugman, Professor of Economics



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